



## Goals

PA002

Contact Shared Services at 1-888-500-5999 if you need assistance completing this form.

### Employee Information

Name: Douglas W Baillie Date: 02/04/99  
 Branch: Cincinnati  
 Department: Adm  
 Job Title: Reg Cgl-Prac Leader Pay Band: 6  
 Employee Updated Date: 07/06/99

### Section 1 - Business Goals

Create 4-6 clear goals. State measurable outcomes that support the achievement of the business plan. All employees are expected to contribute continuously to the achievement of Chubb's goals by providing superior service to customers, collaborating with co-workers and learning from and teaching others.

#### Goals:

##### BRANCH/REGION:

- \* Meet/Exceed premium plans by department/line of business
- \* Managed New/Lost business plan
- \* Manage rate increases to meet plan
- \* Meet commission plans by department/line of business
- \* Manage risk selection to insure profitability
- \* Manage controllable expenses to plan.
- \* Reduce expense ratio.
- \* Maintain active and aggressive travel in conjunction with all staff to retain/grow customer base and roundout product opportunities.
- \* Analyze producer business plans and create strategy to optimize our results near and longterm.
- \* Build and maintain effective relationships with producers and customers at the appropriate levels.
- \* Take leadership role in agency management.
- \* Manage account rounding system that successfully creates activity to build relationships with our largest of clients in retention of those accounts.
- \* Develop and manage account management system for Columbus, Louisville and Cincinnati in 1999.
- \* Develop written agency plans for the agents in Louisville, Columbus and Cincinnati for the 1999 year.
- \* Build and maintain an agency travel plan and measurement system that will measure the frequency and quality of agency visits.

##### Service:

- \* Turn around the service problems in Columbus, Louisville and Cincinnati by:
  1. Developing systematic gameplan to reduce the backlog and put service on track through the CSD Manager.
  2. Conducting meetings with the CSD staff to ensure morale stays high under these difficult times.
  3. Assigning regional trainer to improve the quality and development of the entire CSD staff throughout the region.

EXHIBIT

BAILLIE B

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**Collaboration with others:**

- \* Provide the vision that will drive the branch to exceed goals through the turn of the century.
- \* Mentoring coach staff to reach their maximum potential.
- \* Provide semi-annual reviews to all management staff to give and get feedback and provide direction to staff
- \* Coach department managers to establish team travel with their employees.
- \* Involve manager and employees in local community business activities to broaden their business awareness, seek opportunities and give back to the community.
- \* Establish an environment that encourages teamwork and cooperation
- \* Ensure the minorities in the branch are receiving adequate mentoring and developments so that they are ready to take on additionally responsibility and positions for promotion.
- \* Create a branch environment where all employees feel included.
- \* Conduct regional meeting to build teamwork and provide vision and direction for 1999 and 2000.
- \* Institute a system that ensures that all employees have up-to-date performance goals and competency assessments to help mentor and coach to superior results.
- \* Build a branch environment where all employees feel included.

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**Section 2 - Learning Goals**

State goals aimed at demonstrating growth in specific knowledge and skill areas. Use your competency assessment results as the basis for setting these goals.

Goals:

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**Section 3 - Weighting Goals - Optional**

Weighting of Business Goals - Section 1: 80%  
Weighting of Learning Goals - Section 2: 20%

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**Approval Section**

[Redacted Signature]

Name: Terrence W Cavanaugh

Date: 04/21/99 01:45:16 PM

Name:

Date:

Comments:

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## Competency Assessment

PA001

Contact Shared Services at 1-888-500-5999 if you need assistance completing this form.

### Employee Information

Name: Douglas W Baillie Date: 02/04/99  
Branch: Cincinnati  
Pay Band: 6 Job Title: Reg Cgl-Prac Leader  
Employee Updated Date: 02/05/99

### Universal Competency Assessment

#### Results Orientation

Employee Rating: 4

Achieves results through accurate and timely decision-making according to established standards and/or change processes that ensures Chubb's reputation as a quality, service oriented and value-added organization.

Comments:

#### Customer Focus

Employee Rating: 4.5 advanced proficiency

Delivers quality products in a timely manner, meeting or exceeding expectations.

Comments:

#### Teamwork

Employee Rating: 4

Works effectively with others to help create an open and supportive environment. Capitalizes on collaboration and diversity of thought to achieve Chubb's goals.

Comments:

#### Leadership

Employee Rating: 4

Influences others to positively contribute to and support vision, values, diversity initiatives, and business strategies of Chubb.

Comments:

#### Communication

Employee Rating: 3.5

Creates and sustains an environment in which information flows freely in a clear, concise and direct manner.

Comments:

#### Coaching/Developmental

Employee Rating: 4.5 advanced proficiency

Provides assistance to others through sharing expertise, providing constructive feedback and giving encouragement to help others better handle current and new tasks, develop confidence and competencies and deliver needed results.

Comments:

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**Domain Competency Assessment**

**Branch Manager Domain**

**Business Development**

Employee Rating: 4

Develops and maintains the mix of business which results in meeting or exceeding growth and profit goals.

Comments:

**Financial Management**

Employee Rating: 3.5

Manages all financial aspects of the business including planning, expenses, pricing, premium growth, profitability and income.

Comments:

**Operational Management**

Employee Rating: 4.5 advanced proficiency

Leads and maintains continuous influence over a broad spectrum of business activities demonstrating depth and breadth of necessary skills and knowledge to meet/exceed goals.

Comments:

**Human Resources**

Employee Rating: 4

Establishes and manages relationships with others that enable each individual and team(s) to maximize potential.

Comments:

Employee Rating:

Comments:

Employee Rating:

Comments:

**Approval Section**



Name: Terrence W Cavanaugh

Date: 04/21/99 01:44:58 PM

Name: Douglas W Baillie

Date: 04/22/99 10:31:07 AM

Comments:

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